

Issues & Logs

What are Issues & Logs?

Issues & Logs are ePM documents used to log, manage, and verify the resolution of items that require attention on a project. There are several types of Issues & Logs and each has their own business process requirements for reporting purposes. They comprise of the following:

Issue Types	Issue Description
Accident Report	Used to track and report all accident incidents on a project. Serves as the Accident Investigation Report
Design Review Comments	After users receive notification that a drawing package is ready for review they have the ability to create multiple comments associated with the package. Comments are routed to the appropriate users to reply, take action, and confirm a resolution.
Fire Report	Used to track and report all fire incidents on a project. Serves as the Fire Incident Report
Injury Report	Used to track and report work-related injuries that occur on a project
Issue	Used to manage, log, and track other issues that occur on a project
Punchlist	Used to track information about items in your project that must be finished, fixed or redone to complete the project
Safety Notice	Used to track safety violations that occur on a project

Table 1.1 – Issue Types and Descriptions

Who Will Use This?

- √ Superintendent
- √ General Contractor
- √ Project Manager & Staff
- √ Project Engineer
- √ Construction Manager
- Architect/Engineer
- $\sqrt{}$ Inspector
- √ Job Site Administrator

Steps to Create Issues & Logs

In this example, we will create a Punch List item as a Issues & Logs document.

- 1. Log into ePM as a user with the Issues & Logs security role and navigate to the appropriate project.
- Navigate to your Issues & Logs register by clicking on Applications > Field Management >
 Issues and Logs. The Issues & Logs register displays.



3. Click the 'New' down arrow button, select Punch List, and the document opens in edit mode.



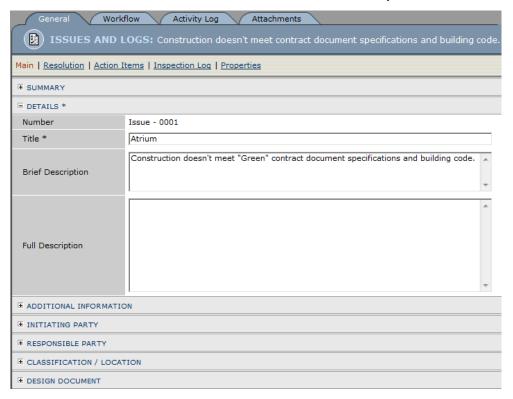
Note: All of the Issues & Logs templates are easily categorized in the register view. The numbering system will have the Deficiency Type in front of the auto-sequential number as shown here.





Steps to Create Issues & Logs, (cont.)

4. Enter the **Title** in the Details section. Also, enter a **Brief Description**.



5. Enter the **Initiating Party**, **Responsible Party** and **Date Reported** information.



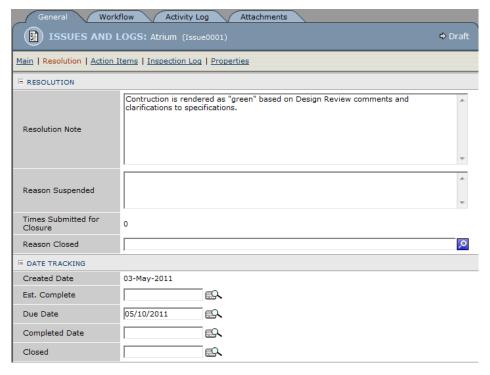
Steps to Create Issues & Logs, (cont.)

6. Each Deficiency has a **Classification / Location** section with various fields to help track and report details of the deficiency. Select the 'Lookup List' icon and select an item from each that best categorizes the deficiency.



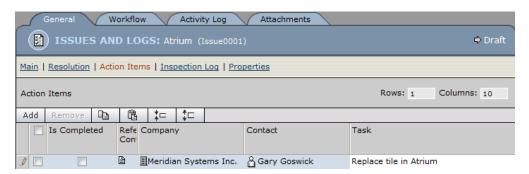
NOTE: Use the following pages in the document if further action is necessary for tracking this deficiency.

7. **Resolution Page:** Enter the **Due Date**. Once the deficiency is resolved, enter the **Resolution Note** and the deficiency **Completed Date**. The **Created Date** and **Closed Date** are populated automatically as the document transitions through workflow.



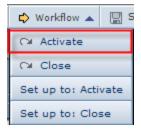
Steps to Create Issues & Logs, (cont.)

8. Action Items Page: For each action item, record the Company, Contact, Task and Due Date, and eventually the Date Completed.



NOTE: When the Task is complete, the Contact enters the **Date Completed**, a **Note** of the action taken, and checks the **Is Complete** box.

9. Once all the Action Items are entered, select the Workflow menu and Activate the document.



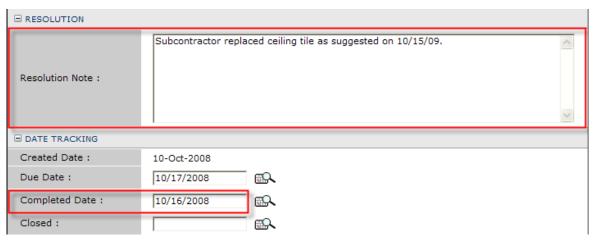
10. Inspection Log Page: Inspections items for the issue/log are recorded on this page





Steps to Create Issues & Logs, (cont.)

IMPORTANT: Once a Issues & Logs item is inspected and all action items are complete, remember to enter the **Resolution Note** and **Completed Date** from the Resolution page and Date Tracking section.



The Issues & Logs document is now complete.



Tips ✓ Required fields are marked with an asterisk. ✓ Use the 'Forward' button if collaboration is required from other users. ✓ Click on the Activity Log tab to view the audit trail of the document. ✓ Clicking the online help button provides generic help related to Issues & Logs, NOT for the specific uses of GSA's Issues & Logs documents. ✓ To explode or collapse sections in a document, click on the double headed arrow buttons: ✓ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc'd. ✓ For additional help and support, contact your GSA Regional Point of Contact: ✓ Use the Attachments tab to link Issues & Logs to other ePM or external documents